

**HECM Past Performance Questionnaire****PAST PERFORMANCE INFORMATION SURVEY**

Please complete the following questionnaire and return via email or fax to the attention of:

**Jennifer J. Awkard/  
Contracting Officer  
U.S. Department of Housing and Urban Development  
Office of the Chief Procurement Officer  
Community Services/Housing Support Division  
451 7th Street, SW, Room 5256  
Washington, DC 20410**

**by (Date) July 7, 2009**

202-401-2032

(Fax Number)

\_\_\_\_\_  
This survey pertains to: \_\_\_\_\_

Department/Component: \_\_\_\_\_

Contract Number: \_\_\_\_\_ Date of Survey: \_\_\_\_\_

Name of Person Completing Survey: \_\_\_\_\_

Signature of Person Completing Survey: \_\_\_\_\_

Your Company/Agency: \_\_\_\_\_

Your Role in this Contract (*circle one*): Contracting Officer  
Contract Specialist Project Officer Other \_\_\_\_\_

Contract Value (*including options*): \$\_\_\_\_\_

Performance Period: \_\_\_\_\_  
(*including option periods*)

Type of Contract: \_\_\_\_\_

Approximate percentage of work being performed (or completed) by subcontractor(s):  
\_\_\_\_\_%

## PAST PERFORMANCE INFORMATION SURVEY

Information on subcontractor(s) (where more than \_\_\_\_\_ % of work was completed by the subcontractor):

Subcontractor	Program Manager	Phone
Subcontractor	Program Manager	Phone
Subcontractor	Program Manager	Phone

General description of products/services required under the contract:

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### RATINGS

*Please answer each of the following questions with a rating that is based on objective measurable performance indicators to the maximum extent possible.*

*Commentary to support rating shall be noted on page 4.*

*Assign each area a rating of 0 (Unsatisfactory), 1 (Poor), 2 (Fair), 3 (Good), 4 (Excellent), or 5 (Outstanding). Use the attached Rating Guidelines as guidance in making these evaluations. Circle the appropriate rating. If you do not have enough personal knowledge or feedback from internal customers who directly received products and services from the contractor to make a determination on any of the performance criteria below, please circle "N/A" (not applicable/no opinion).*

#### QUALITY OF SERVICE

1. Compliance with contract requirements	0	1	2	3	4	5	N/A
2. Accuracy of reports	0	1	2	3	4	5	N/A
3. Effectiveness of personnel	0	1	2	3	4	5	N/A
4. Technical Excellence	0	1	2	3	4	5	N/A

## PAST PERFORMANCE INFORMATION SURVEY

COST CONTROL (Not applicable to Fixed Price Type Contracts)

1. Record of forecasting and controlling target costs

0      1      2      3      4      5      N/A

2. Current, accurate and complete billings

0      1      2      3      4      5      N/A

3. Relationship of negotiated costs to actuals

0      1      2      3      4      5      N/A

4. Cost efficiencies

0      1      2      3      4      5      N/A

TIMELINESS OF PERFORMANCE

1. Met interim milestones

0      1      2      3      4      5      N/A

2. Reliability

0      1      2      3      4      5      N/A

3. Responsive to technical direction

0      1      2      3      4      5      N/A

4. Completed on time including wrap-up and contract administration

0      1      2      3      4      5      N/A

5. Met delivery schedules

0      1      2      3      4      5      N/A

6. Liquidated damages assessed: Yes No (*circle one*)BUSINESS RELATIONS

1. Effective management, including management of subcontracts

0      1      2      3      4      5      N/A

2. Reasonable/cooperative behavior

0      1      2      3      4      5      N/A

3. Responsive to contract requirements

0      1      2      3      4      5      N/A

4. Notification of problems

0      1      2      3      4      5      N/A

## PAST PERFORMANCE INFORMATION SURVEY

5. Flexibility

0	1	2	3	4	5	N/A
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6. Pro-active vs reactive

0	1	2	3	4	5	N/A
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## PAST PERFORMANCE INFORMATION SURVEY

SMALL BUSINESS AND SMALL DISADVANTAGED BUSINESS GOALS

2. The contractor met the goals set forth in its Subcontracting Plan.

(See FAR 19.7 and 15.305(a)(2)(v))

Yes No N/A (*circle one*)

Comments: (optional) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. The contractor met Small Disadvantaged Business Participation goals.

(See FAR 15.305(a)(2)(v) and FAR 19.1202)

Yes No N/A (*circle one*)

Comments: (optional) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

CUSTOMER SATISFACTION

1. The contractor is committed to customer satisfaction.

Yes No (*circle one*)

2. Would you recommend selection of this firm again?

Yes No (*circle one*)

## ADDITIONAL COMMENTS

## PAST PERFORMANCE INFORMATION SURVEY

## RATING GUIDELINES

	QUALITY OF PRODUCT OR SERVICE	COST CONTROL	TIMELINESS OF PERFORMANCE	BUSINESS RELATIONS
0-Unsatisfactory	Contractor is not in compliance and is jeopardizing achievement of contract objectives	Contractor is unable to manage costs effectively	Contractor delays are jeopardizing performance of contract objectives	Response to inquiries, technical/service /administrative issues is not effective
1-Poor	Major problems have been encountered	Contractor is having major difficulty managing costs effectively	Contractor is having major difficulty meeting milestones and delivery schedule	Response to inquiries, technical/service /administrative issues is marginally effective
2-Fair	Some problems have been encountered	Contractor is having some problems managing costs effectively	Contractor is having some problems meeting milestones and delivery schedule	Response to inquiries, technical/service /administrative issues is somewhat effective
3-Good	Minor inefficiencies/errors have been identified	Contractor is usually effective in managing costs	Contractor is usually effective in meeting milestones and delivery schedule	Response to inquiries, technical/service /administrative issues is usually effective
4-Excellent	Contractor is in compliance with Contract requirements and/or delivers quality products/services	Contractor is effective in managing costs and submits current, accurate, and complete Billings	Contractor is effective in meeting milestones and delivery schedule	Response to inquiries, technical/service /administrative issues is effective
5-Outstanding: The contractor has demonstrated an outstanding performance level in any of the above four categories that justifies adding a point to the score. It is expected that this rating will be used in those rare circumstances when contractor performance clearly exceeds the performance levels described as "Excellent."				